

Where Do I Start?

Welcome to the Contracts and Procurements Website. You will find lots of information here to answer a variety of questions about Information Technology (IT) Contract and RFP "best practices" in Vermont. This document provides short answers to the following questions to help you get started:

1. How can the Enterprise Project Management Office help my project?
2. I want to write an IT RFP - how do I start?
3. How long does the RFP process take?
4. I want to write an IT Contract – how do I start?
5. How long does the Contract process take?

1. How can the Enterprise Project Management Office (EPMO) and the Contracts and Procurements Specialist help my project?

The EPMO is staffed by people who specialize in helping IT projects succeed - from start to finish. Whether you need to talk through a project plan, have questions about writing an IT RFP or contract, need advice on project management tools and strategies, or help with organizational change and risk management, the EPMO is your one-stop resource.

The EPMO is part of the Office of the CIO. This makes the EPMO unique in the State in that the staff is involved at some level in virtually every IT-related project in the State. The CIO's office is also staffed with an Enterprise Architect. Being a statewide office allows the EPMO to have some distinct advantages to help you, including:

- The EPMO works closely with the CIO to establish and publish statewide standards, guidelines, and trends.
- The EPMO often has the ability to help you answer the question "Has anyone else in the State done what we'd like to do - and if so, what did they do, how did they do it, and what did they learn?". Why should you reinvent the wheel? The EPMO can help you take advantage of valuable experience gained in other departments.
- Knowledge of the IT process - everything from how the RFP or Contract process works to best practices for managing projects. Many teams are not only writing an IT RFP or IT Contract for the first time, but managing an IT study or implementation may not be their prime mission. Providing advice, and occasionally hands-on experience, is the purpose of the EPMO.

2. I want to write an IT RFP – where do I start?

If you have not written an IT RFP before, or even if you have, the following are some important procedures:

- **PlanIT** - please be sure the PlanIT record is completed for your project. This is always the first step. The CIO will not approve any RFP without a completed PlanIT record. If you don't know

how to fill out PlanIT, please contact the IT Manager or Business Manager in your department/agency, or call the EPMO.

- **EPMO Website** - Please go to the Templates/Project Initiation page of this website. There you will find document templates and instruction papers to help you get started.
- **Appoint a Project Manager** - It is important that one person is responsible for "the project". Senior management needs to be sure there is a project manager in place who can lead the RFP and contract processes, and lead the project to a successful conclusion.
- **Meet with the EPMO before you get too far along** - Please do not wait until you think you are "done" writing an RFP before reviewing your project with the EPMO. When you've completed the Project Charter, call the EPMO to set up an appointment to review. At this meeting you can bring the EPMO and Contracts & Procurements Specialist up to speed on your project (this helps keep the CIO's office informed of pending projects), discuss any issues, and set a schedule for the RFP work. This also works well with Contracts.
- **Download the Information Technology RFP Template** - Once a project strategy is reviewed with the EPMO is it time to start writing the RFP. You must use the IT RFP Template found on the EPMO or BGS Website. If you have questions about this, please email or call the Contracts & Procurement Specialist at 828-5746 or peter.kipp@state.vt.us.

RFP Info

- **Posting a quality RFP** - It is very important to plan on putting some real elbow-grease into your RFP. Walking through the Scope of Work is especially important to be sure you have clearly defined what you want the vendor to deliver. Read through your Scope of Work from the point of view of the vendor -- could you provide a solid fixed-price quote for the deliverables based on the information you supplied? Be as specific as possible to provide the vendor with enough information to give you a solid fixed-price quote without asking you a lot of follow-up questions. Yet, allow vendors to propose innovative solutions that you may not have considered (you may gain new ideas when reading the proposals.) Crafting a solid RFP is one of the most important things you can do to help insure a successful outcome to your project.
- **Plan ahead!** - Please do not wait until the last minute to start writing your RFP or Contract. RFP's and Contracts take time - both your time to write it, and time for others to review it. Be sure to allow at least three week from the time you think you will be "done" with the RFP until the date it is posted on the Purchasing website - generally two weeks for a final review in the CIO's office and one week for final review and posting in Purchasing. Contracts require more approval time and process time because the Attorney Generals Office has to approve it along with the Secretary of Administration in most cases.

3. How long does the RFP process take?

The RFP process can take from a few weeks to a few months depending on the complexity of your project. In Templates, please use the StepsToRFP document to help you walk through the steps of the RFP process and estimate the timeframes for your project. The EP MO will review this document with you at the initial meeting mentioned above. You should be sure to specify any special timing considerations as early in the RFP process as possible (for example, you will lose funding on a certain date).

4. How long does the Contract process take?

The Contract process can take over a month due to the signature process of the Agencies involved. You have to plan on a 2 week process for each Agency involved. You have your own Agency, the Attorney General's office, CIO Office, Finance & Management and Secretary of Administration and sometimes Building and General Services (BGS).

At the end do not forget the Contract also needs the approval of the Vendor and their signature.